

USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/10 thru 01/16.

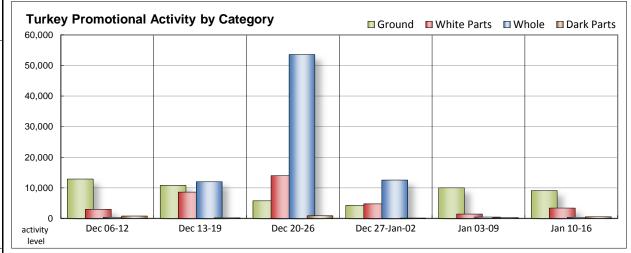
processor brands, lower on private brands.

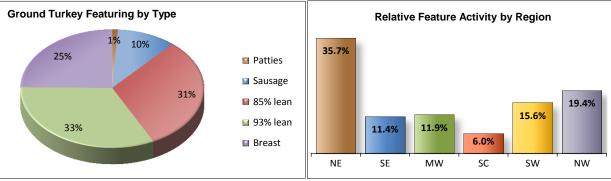
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound tresh unless otherwise noted; NATIONAL SUMMARY											
	NAT	IONAL S	UMMAI	RY							
	THIS	WEEK	LAST	WEEK	LAST	YEAR					
Feature Rate 1/	48.1%	of 23,200	46.1%	of 23,200	49.6% of 23,200 outlets						
	ou	tlets	ou	tlets							
Special Rate 4/	4.	0%	5.	4%	0.	9%					
Activity Index 2/	17	,720		,810		,330					
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens	250		220		310	-					
" - Toms	110	1.03	260	1.22	310	1.03					
PARTS:											
Breast:											
Bone-in, whole											
Fresh	80	3.23	10	2.99	180	3.03					
Frozen	930	1.86	330	1.73	360	1.94					
Split, bone-in											
Fresh	30	2.99			170	2.99					
Rotisserie	580	8.49	210	8.70	1,060	8.57					
Boneless, whole	20	3.99	130	5.84							
Cutlets	940	4.81	760	4.16	400	4.51					
Cutlets, thin sliced			10	3.99	130	4.99					
Strips											
Tenders	840	4.73	10	4.79	550	4.44					
Marinated Tenders	1,820	4.92	490	4.19	220	3.89					
Drumsticks	160	1.75	100	1.77	60	1.72					
Thighs	30	2.38	10	2.49	40	2.25					
Wings	30	2.23	60	1.85	120	2.35					
Necks	10	1.49	10	1.49	20	1.44					
Smoked Drumsticks	70	2.36	30	2.15	20	2.24					
Smoked Wings	170	2.00	50	2.01	30	2.06					
Smoked Necks	90	1.96	50	2.01	10	1.99					
GROUND TURKEY:	9,120	3.40	10,020	3.31	12,690	3.21					
Patties	90	3.88	160	3.73	890	3.77					
Sausage	960	3.29	600	3.32	1,920	3.42					
85% lean	2,840	2.69	2,810	2.57	2,850	2.73					
93% lean	2,970	3.20	4,800	3.27	5,810	3.05					
Breast	2,260	4.96	1,650	4.76	1,220	4.27					
Rolls (frsh/frz 1 lb.)	610	1.99	1,040	2.15	320	1.78					
Specialty 5/											
Patties			1,310	4.94	230	3.99					
93-94% lean	1,180	4.31	580		460	3.99					
Breast	650	5.99	120	6.13	640	5.50					
Note: rolls & specialty no	ot included	l in ground	turkey tota	al and weig	hted avera	age.					

This Week's Turkey Feature Highlights

Retail feature activity improves heading towards the middle of the month. Offerings continue light on whole turkeys, typical for this time of year. Not to worry, frozen bone-in breasts are widely promoted, although prices trend higher. More stores are promoting rotisserie breasts, mostly in the Northeast region. Boneless white parts are getting more ad space this week; marinated tenders are heavily promoted although prices are sharply higher. Dark parts are fully represented and promotions are slightly more active. Ground turkey featuring slows; the weighted average price increases. Retailers cut back on 93% promotions and increase offerings on ground breast. Featuring on specialty ground turkey continues to be popular. There is slightly more retail activity on service deli and self-service deli items. Thick slicing meats are the most actively promoted, but the deli shaving meats account for the increase in service deli activity. Self-service deli prices are higher on





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

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Fri. Jan 10, 2014

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	HEAST U.S.			SOUT	HEAST U.S.		MIC	MIDWEST U.S.					
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,	FL,GA,M	S,NC,SC,TN,VA,\	VV)	(IA,IL,IN,KY,MI	,MN,ND,NE,OH,S	D,WI)				
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	6.2% of stores w	0 sampled outlet / no-price promo Index = 7,610			f stores v	00 sampled outle v/ no-price prom v Index = 3,310		39.0% of 4,200 sampled outlets 3.0% of stores w/ no-price promotions Activity Index = 2,310						
	Price Range (\$/pound)	Summary Stores V	y Vtd Avg	Price Ra (\$/pou	_	Summa Stores	iry Wtd Avg	Price Range (\$/pound)	Summa Stores	ary Wtd Avg				
	(φ/ρουπα)	Stoles V	viu Avy	(φ/ρου	iu)	Stoles	vviu Avg	(φ/ροαπα)	Sitiles	vviu Avg				
WHOLE BIRDS:														
Fresh - Hens														
" - Toms														
Frozen - Hens	0.99	140	0.99		0.99	70	0.99							
" - Toms					0.99	70	0.99							
PARTS:														
Breast:														
Bone-in, whole														
Fresh	2.99 - 3.29	80	3.23											
Frozen	1.49 - 1.99	300	1.88	1.29 -	1.99	110	1.89	1.29 - 1.99	320	1.85				
Split, bone-in														
Fresh	2.99	30	2.99											
Rotisserie	8.49	510	8.49		8.49	70	8.49							
Boneless, whole	3.99	20	3.99											
Cutlets	3.99 - 5.99	810	4.81	;	3.99	40	3.99	4.99 - 5.99	90	5.18				
Cutlets, thin sliced														
Strips														
Tenders	3.99 - 4.99	690	4.72	3.99 -	4.99	50	4.21	4.79 - 5.99	90	5.13				
Marinated Tenders	3.73 - 5.33	530	4.39	3.33 -	5.33	1,250	5.16	5.33	10	5.33				
Drumsticks	1.69 - 2.49	150	1.77			,		1.49	10	1.49				
Thighs	2.29 - 2.49	30	2.38											
Wings	2.49 - 2.79	20	2.60					1.49	10	1.49				
Necks								1.49	10	1.49				
Smoked Drumsticks	1.99 - 2.49	70	2.36											
Smoked Wings	1.48 - 1.99	150	1.97		2.40	10	2.40	1.99	10	1.99				
Smoked Necks	1.99	70	1.99					1.69 - 1.99	20	1.84				
GROUND TURKEY:														
Patties	3.99	10	3.99	:	3.59	10	3.59	3.99	20	3.99				
Sausage	3.19 - 4.09	510	3.55	3.19 - 3	3.59	20	3.38							
85% lean	2.33 - 3.07	1,170	2.75	2.50 - 3	3.19	480	2.69	1.99 - 2.99	360	2.74				
93% lean	2.30 - 3.99	1,380	3.27	2.30 - 3	3.79	580	3.06	2.66 - 3.49	400	3.17				
Breast (99-100% lean)	3.76 - 5.38	230	4.80					3.27 - 5.19	230	3.74				
Rolls (frsh/frz 1 lb.)								1.49 - 2.50	500	1.96				
Specialty ^{5/}														
Patties														
93-94% lean	3.59 - 6.99	180	4.01	3.99 - 4	4.99	480	4.24	3.99	220	3.99				
Breast	5.99	530	5.99		5.99	70	5.99	6.99	10	6.99				



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	SOUTH (CENTRAL U.S.			SOUT	HWEST U.S.		N				
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	,UT)		(C	A,HI,NV)		(AK,ID,MT,OR,WA,WY) 74.4% of 1,200 sampled outlets 15.5% of stores w/ no-price promotions Activity Index = 1,130				
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	2.9% of stores v	00 sampled outle v/ no-price promo Index = 1,170	tions	0.0%	of stores w	00 sampled outle 1/ no-price promo Index = 2,190	tions					
	Price Range (\$/pound)	Summar Stores V	y Vtd Avg	Price (\$/pc	Range ound)	Summar Stores V	y Vtd Avg	Price Rang (\$/pound)		Summa tores	ary Wtd Avg	
WHOLE BIRDS: Fresh - Hens " - Toms Frozen - Hens	1.09	40	1.09									
" - Toms	1.09	40	1.09									
PARTS: Breast: Bone-in, whole Fresh Frozen Split, bone-in Fresh Rotisserie Boneless, whole Cutlets Cutlets, thin sliced Strips Tenders	0.99 - 1.89 4.99	130	1.73					1.99		70	1.99	
Marinated Tenders	3.73	10	3.73					3.99)	20	3.99	
Drumsticks Thighs Wings Necks Smoked Drumsticks Smoked Wings Smoked Necks												
GROUND TURKEY:				2 60	4 20	50	200					
Patties Sausage 85% lean	2.91 - 3.67 1.99 - 3.50	110 210	3.00 3.06	3.69 2.45 2.39	- 4.99	50 320 490	3.88 2.97 2.47	2.16 - 2.39	,	130	2.32	
93% lean	2.49 - 3.49	160	3.26	3.19		240	3.39	2.39 - 3.59		210	2.32	
Breast (99-100% lean)	3.58 - 5.19	300	3.26 4.84	5.19		840	5.20	5.19 - 5.42		660	5.19	
Rolls (frsh/frz 1 lb.)	1.49 - 2.50	90	2.02	3.13	5.00	040	0.20	2.50		20	2.50	
Specialty 5/ Patties	1.70 - 2.00	30	2.02					2.00	,	20	2.00	
93-94% lean Breast	3.99 5.99	40 30	3.99 5.99		4.99	250	4.99	4.19 5.19		10 10	4.19 5.19	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jan 10, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/10 thru 01/16.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	NATIONAL SUMMARY		NORTHE	AST U.S.		SOUTHEAST U.S.									
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,N	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)				
1/	69.6% o	f 23,200	68.2% o	f 23,200	63.5% o	f 23,200									
Feature Rate 1/	sto	res	sto	res	sto	res	86.9% of 4,600 s	86.9% of 4,600 sampled outlets			61.5% of 6,100 sampled outlets				
Activity Index 2/	45	240	44	830	13	950	Activity Inde	Activity Index = 17,140			Activity Index = 7,020				
Activity index 21	45,	240	44,	030	45,	330	Price Range	Price Range Summary		Price Range	Summary				
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg			
SERVICE DELI - Turkey															
Category 1															
Processor Brand	5,720	7.93	7,490	7.72	5,690	7.76	5.98 - 9.99	3,210	8.02	6.99 - 8.99	430	8.35			
Private Brand	1,850	7.83	1,390	7.82	3,290	7.64	6.47 - 8.99	1,470	7.77	7.49 - 7.99	140	7.73			
Category 2	0.000	0.00	0.070	- 0-	4 000	0.40	4.50	4 000		4.00	4.40	0.50			
Processor Brand	3,330	6.03	3,970	5.85	4,020	6.10	4.58 - 6.98	1,020	5.71	4.99 - 6.99	440	6.50			
Private Brand	2,590	6.32	3,830	6.62	1,420	6.59	4.99 - 6.99	940	6.38	5.99 - 6.99	620	6.87			
Category 3 Processor Brand	2,020	3.95	590	3.91	940	2.00	3.60 4.00	970	4.00	3.88 - 3.99	140	3.93			
Processor Brand Private Brand	1,100	3.95 6.10	60	3.91 4.64	80	3.86 3.87	3.69 - 4.99 5.48 - 6.99	130	4.00 6.49	3.88 - 3.99 6.99	40	6.99			
Turkey Ham	1,100	0.10	00	4.04	80	3.01	5.46 - 6.99	130	0.49	0.99	40	0.99			
Processor Brand	340	3.91	290	3.60	190	3.00	3.49 - 4.99	210	3.98	4.99	20	4.99			
Private Brand	340	0.01	40	4.48	130	3.00	0.43 - 4.33	210	5.50	4.55	20	4.55			
Turkey Pastrami			40	4.40											
Processor Brand	450	4.14	250	3.96	370	4.02	3.79 - 4.99	120	4.82	4.99	20	4.99			
Private Brand	100		200	0.00	0.0	1.02	0.70	120	1.02	1.00		1.00			
SERVICE DELI - Chicken															
Category 1															
Processor Brand	3,350	7.81	3,380	7.42	3,640	7.65	5.99 - 8.99	1,370	7.99	6.99 - 8.99	1,220	7.96			
Private Brand	1,030	7.46	680	6.45	380	7.41	7.99	190	7.99	6.99	440	6.99			
Category 2	1,000	7.10	000	0.10	000		7.00	100	7.00	0.00	1.0	0.00			
Processor Brand	480	5.04	120	5.01	90	4.96	4.99 - 5.99	250	5.06						
Private Brand	230	5.93	370	5.99	290	5.97									
SELF-SERVICE DELI															
(dollars per tub or pouch)															
Turkey 7-10 oz															
Processor Brand	7,320	2.99	8,610	2.89	7,380	3.04	1.99 - 3.99	2,620	3.03	1.79 - 3.69	810	3.04			
Private Brand	3,530	2.56	2,160	3.04	6,460	3.18	2.48 - 3.50	880	2.76	1.99 - 2.98	930	2.31			
Turkey 16 oz															
Processor Brand	1,360	5.22	610	5.54	510	5.17	4.50 - 6.49	390	5.56	5.00 - 6.49	60	5.88			
Private Brand			390	4.99											
Chicken 7-10 oz	_		_		_			_	_						
Processor Brand	7,010	2.99	8,440	2.86	6,040	3.02	1.99 - 3.99	2,490	3.03	1.79 - 3.69	780	3.04			
Private Brand	3,530	2.56	2,160	3.04	3,160	3.04	2.48 - 3.50	880	2.76	1.99 - 2.98	930	2.31			

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

		EST U.S.			ENTRAL U			VEST U.S.			VEST U.S.		
	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 72.5% of 4,200 sampled outlets Activity Index = 8,050			R,AZ,CO,KS,L	A,MO,NM,O	K,TX,UT)	(CA,I	HI,NV)		(AK,ID,MT,OR,WA,WY) 78.2% of 1,200 sampled outlets			
Feature Rate 1/				56.0% of 4,20	0 sampled c	outlets	69.8% of 2,900	sampled or	utlets				
Antivity Index 0/				Activity	Index = 4,87	0	· ·	dex = 5,760		Activity In	dex = 2,400		
Activity Index 2/	Price Range	Summary	F	Price Range	Summ	nary	Price Range	Summ	nary	Price Range	Summ	ary	
	(\$/pound)	Stores Wtd A	/g	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	/td Avg	(\$/pound)	Stores V	Vtd Avg	
SERVICE DELI - Turkey													
Category 1													
Processor Brand	5.99 - 9.99	680 7.4	15	7.99 - 9.99	390	8.02	5.99 - 9.99	890	7.55	6.99 - 12.99	120	9.32	
Private Brand	6.99 - 10.99	210 8.0	61	5.99	30	5.99							
Category 2													
Processor Brand	4.99 - 6.99	1,160 5.9	94	4.99 - 6.99	170	6.22	5.99 - 6.99	410	6.81	4.99	130	4.99	
Private Brand	4.98 - 6.99	590 5.7	70	5.99 - 6.99	440	6.24							
Category 3													
Processor Brand	2.95 - 4.99	340 4.2		3.49 - 4.39	190	3.97				3.49 - 3.98	380	3.50	
Private Brand	3.88 - 6.49	90 6.	13	5.99	230	5.99	5.99	280	5.99	5.99	330	5.99	
Turkey Ham													
Processor Brand	2.99 - 3.99	40 3.9	57	2.99	10	2.99	3.29 - 3.79	60	3.66				
Private Brand													
Turkey Pastrami													
Processor Brand	2.99 - 4.29	100 4.0)3	5.99	20	5.99				2.99 - 3.49	190	3.47	
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	5.49 - 8.49	600 7.	11	6.49 - 8.99	140	7.81	7.99	10	7.99	6.99	10	6.99	
Private Brand	6.99	20 6.9	99	6.99 - 7.99	110	7.23	7.99	270	7.99				
Category 2													
Processor Brand	4.95 - 5.99	60 5.0)6				4.99	170	4.99				
Private Brand	4.98 - 5.99	190 5.9	92	5.99	40	5.99							
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	1.89 - 3.59	1,130 2.9	90	1.99 - 2.69	970	3.05	2.50 - 3.69	1,290	2.93	2.49 - 3.50	500	2.95	
Private Brand	2.50 - 3.00	700 2.0	62	1.99 - 3.00	440	2.50	2.50 - 3.39	460	2.54	2.50 - 3.39	120	2.83	
Turkey 16 oz													
Processor Brand	4.50 - 5.99	370 5.0	00	4.99 - 5.99	370	5.07	4.99	170	4.99				
Private Brand													
Chicken 7-10 oz													
Processor Brand	1.89 - 3.59	1,070 2.8		1.99 - 2.69	880	3.05	2.50 - 3.69	1,290	2.93	2.49 - 3.50	500	2.95	
Private Brand	2.50 - 3.00	700 2.0	32	1.99 - 3.00	440	2.50	2.50 - 3.39	460	2.54	2.50 - 3.39	120	2.83	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)